

## Sales Promotions Employee Procedure - Quick Reference Guide

### Introduction

To ensure rebates are processed accurately when finalizing an invoice with a sales promotion, it's important to follow the step-by-step instructions provided in this guide. For more detailed information please complete Sales Promotions Basics training or ask your supervisor for help.

### Procedure

Complete the following steps when finalizing an invoice with a sales promotion.

Step	Action												
1	Verify and update customer contact information in the POS.												
2	Verify Promo Code (PC) is listed on the invoice. (Only for Exclusive and Pillar Promotions)												
3	Verify invoice numbers. The reprinted invoice number is the original invoice number.												
4	Verify Timeframes. (See grace period section below)												
5	Print rebate forms and educate the customer; follow these steps: <table border="1"><thead><tr><th>Step</th><th>Action</th></tr></thead><tbody><tr><td>1</td><td>Locate and print the appropriate rebate forms, then highlight:<ul style="list-style-type: none"><li>Offer number</li><li>Submission deadline</li><li>Online submission website</li><li>Support contact phone number</li></ul></td></tr><tr><td>2</td><td>Review the highlighted information and remind the customer to submit (postmark) by the deadline.</td></tr><tr><td>3</td><td>Review both the customer information and invoice number; then remind them that the rebate submission information must match the invoice information.</td></tr><tr><td>4</td><td>Set timeframe expectations for receiving the rebate.</td></tr><tr><td>5</td><td>Set customer support expectations and remind the customer to direct all questions to the contact number on the rebate form.</td></tr></tbody></table>	Step	Action	1	Locate and print the appropriate rebate forms, then highlight: <ul style="list-style-type: none"><li>Offer number</li><li>Submission deadline</li><li>Online submission website</li><li>Support contact phone number</li></ul>	2	Review the highlighted information and remind the customer to submit (postmark) by the deadline.	3	Review both the customer information and invoice number; then remind them that the rebate submission information must match the invoice information.	4	Set timeframe expectations for receiving the rebate.	5	Set customer support expectations and remind the customer to direct all questions to the contact number on the rebate form.
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### Check Rebate Status

- Exclusive and Pillar: Visit <https://dt.rebatepromotions.com/#/tracker>
- Manufacturer: Review rebate form for instructions.

### Grace Period

- Exclusive and Pillar:** Five days before and after promotional period. Rebate submission is valid provided that the purchase is initiated **or** completed within the promotional period.
- Manufacturer:** No grace period. Rebate submission is valid only if the purchase is initiated **and** completed within the promotional period.

### Support Channel Definitions

Support channels vary by promotion and are listed on the Promotion Brief.

Store Help Line	Store employee support for Exclusive and Pillar promotions
Rebate Center	Customer support for Exclusive and Pillar promotions
Rebate Help	Customer support for Manufacturer promotions.